



MARCH 21-22, 2024 // NEW YORK, NY

SHERATON NEW YORK TIMES SQUARE HOTEL





HOLLY RAIDER, PHD
*Dean, Quinnipiac University
School of Business*

A message from Dean Holly Raider, Quinnipiac School of Business

As dean of the Quinnipiac University School of Business, I am delighted to officially welcome you to the 2024 Global Asset Management Education (GAME) Forum and Portfolio Competition.

Congratulations to all of our student organizers for the exceptional and thoughtful design of this year's program, and for your professionalism and expertise in working with and attracting some of the world's foremost financial minds. Good luck to students competing in this year's Global Portfolio Competition.

As the world's largest student-run financial conference, this annual event is specifically designed as a space where industry leaders can have an open exchange of ideas to inspire students from around the globe to become the next generation of industry leaders.

At the Quinnipiac University School of Business, we go beyond business as usual: We equip future entrepreneurs, marketers, financiers and other professionals with the tools, practical experiences and insights they will need to thrive in a quickly evolving business landscape. Accordingly, we recently unveiled our new bachelor's degree program in financial technology (FinTech), a discipline that merges the distinctive, hands-on experiential learning for which we are known with one of the fastest-growing sectors of the business world. This new degree will prepare students for a wide range of dynamic and practical applications, including mobile banking, wealth management and blockchain.

As we embark on this significant two-day conference in New York City, the financial capital of the world and our home away from home, construction continues on our new School of Business at Quinnipiac University on our beautiful Mount Carmel Campus in Connecticut. The state-of-the-art facility, beautifully designed by the award-winning global architects Pei Cobb Freed & Partners, will serve as a symbolic bridge between our proud history and our ambitious future. Our faculty, exemplified by Professor Osman Kilic, executive director of GAME Forum, fosters real-world learning opportunities for students to apply what they learn in the classroom. Through GAME Forum's open exchange of ideas, we ensure future business leaders can build connections and deepen their financial acumen.

Our university has made a bold commitment to be the University of the Future with a strategic plan to prepare students for the careers and citizenship of tomorrow; create an inclusive, excellence-driven community; nurture and positively impact internal, local and global communities; and foster lifelong connections and success. These are the hallmarks highlighted throughout this year's GAME Forum.

Thank you for participating in GAME Forum and for being part of our community dedicated to excellence in global business education. I look forward to the promising future we will build together.

Sincerely,

A handwritten signature in black ink that reads "Holly J. Raider". The signature is fluid and cursive, with a long horizontal line extending from the end.



OSMAN KILIC, PHD

*Executive Director & Program Chair,
Professor of Finance,
Quinnipiac University
School of Business*



SCAN TO
DOWNLOAD THE
GAME APP



qu.edu/gameapp

Welcome to the Quinnipiac University GAME Forum XIII

At our annual Quinnipiac University GAME Forum, current and future leaders of the financial services industry gather together to explore and discuss the topical issues our global investment environment faces.

We are enthused to be in NYC and proud to partner with over 100 speakers from more than 70 industry-leading financial services companies, presenting at our keynote panels, workshops and breakout sessions, as well as serving as judges for the annual student-managed portfolio competition. This strong support positively influences our future leaders and their faculty mentors, represented by the 125+ universities, 130 faculty members and 1,100+ students in attendance this year, aiding them in their professional development.

I would like to thank our student volunteers for their tireless efforts to make this unique event happen, as well as my colleagues in the Quinnipiac School of Business, Marketing & Communications and Alumni & Development for your collaboration and excellence.

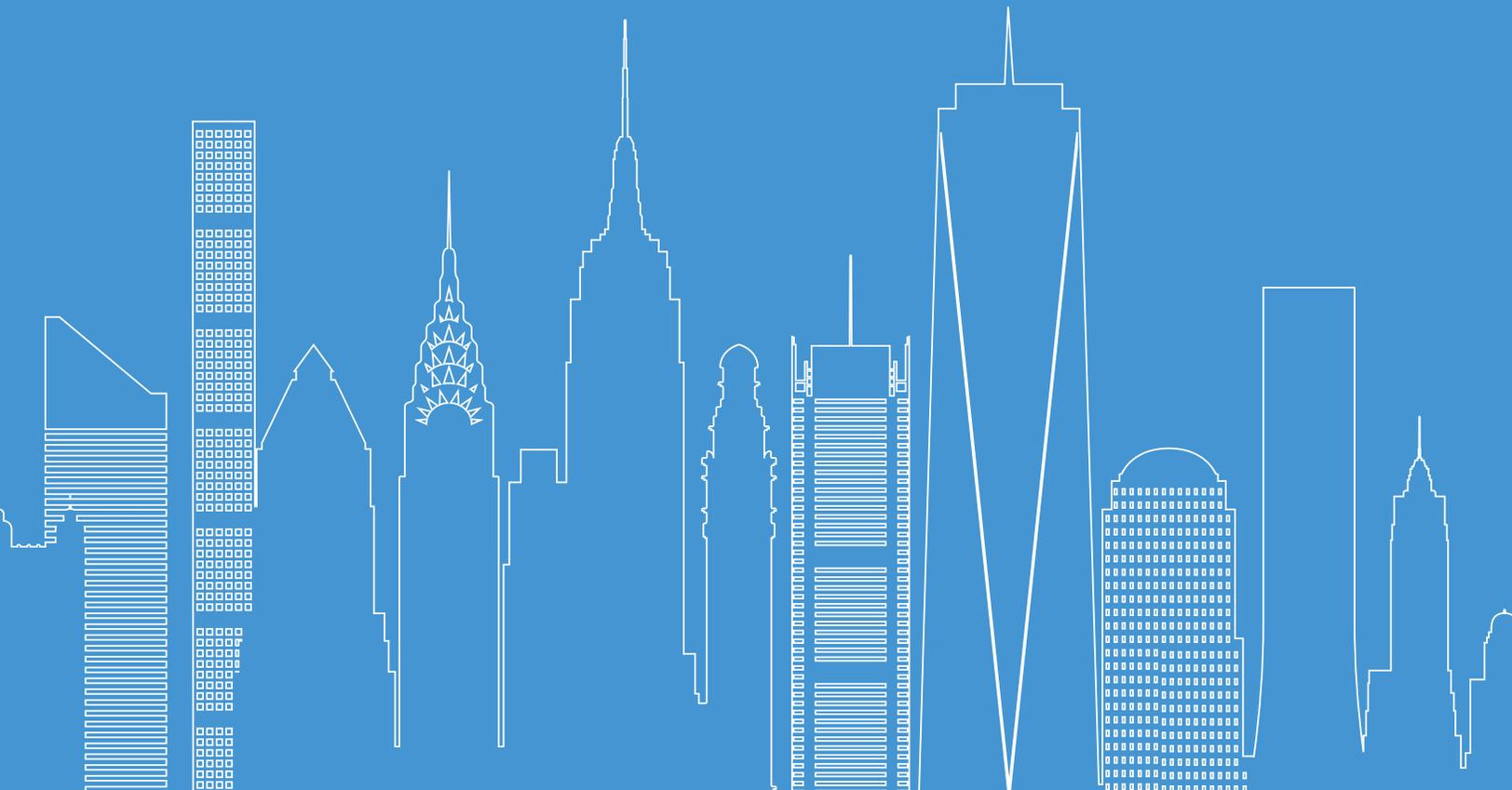
We will start the first day of the conference with two prominent CEOs within the financial services industry, followed by 14 additional keynote speakers as they discuss their insights on the financial markets outlook and its effect on their asset allocation decision, portfolio investment and risk management strategies, given the backdrop of the current and foreseeable state of the U.S. and global economy. Students will have the opportunity to ask questions directly to our renowned panelists at the end of each session.

On the second day, we will host multiple concurrent breakout sessions with keynote panels and workshops focused on various topics, including asset allocation, portfolio management, FinTech, women in finance, crypto assets and hedge funds, to name a few. We also will be hosting multiple post-college career networking events, which will give students the opportunity to directly meet with company representatives and GAME alumni.

We hope to see you again at Quinnipiac University's GAME Forum XIV on April 3-4, 2025, in NYC. Additional information will be available at game.qu.edu, by emailing qgame@qu.edu or by calling 203-582-3888.

Kind regards,

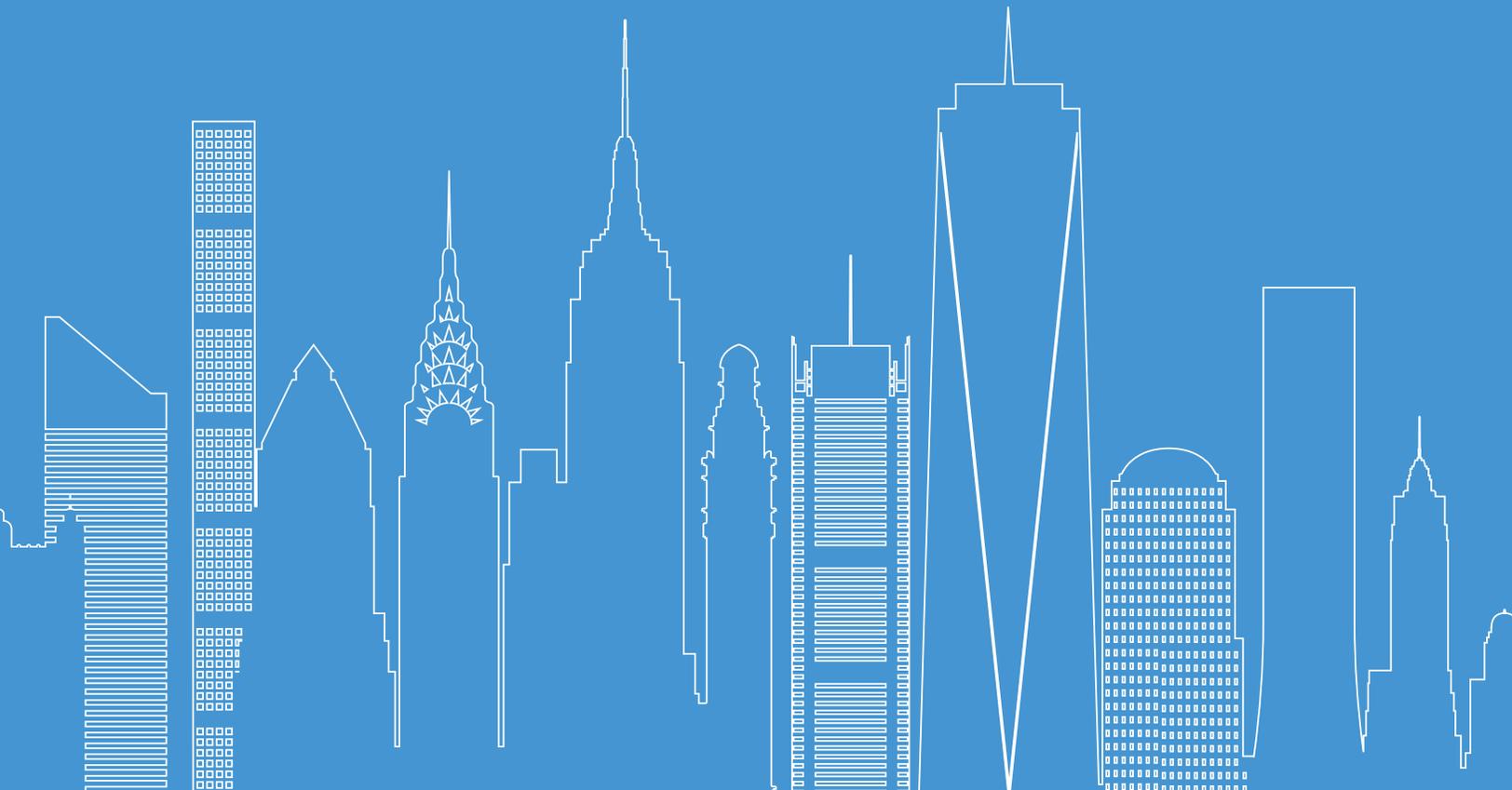
Agenda Day One



DAY 1 **Thursday, March 21**

TIME	VENUE	SESSION
6:30–8:15 a.m.	Empire Ballroom	BREAKFAST
8:30 a.m.	Metropolitan Ballroom	WELCOME Debra Liebowitz, PhD, Provost, Quinnipiac University Holly Raider, PhD, Dean, School of Business, Quinnipiac University
9–10 a.m.	Metropolitan Ballroom	OUTSTANDING FINANCIAL CEOS FIRESIDE CHAT <i>MODERATOR</i> Holly Raider, PhD, Dean, School of Business, Quinnipiac University <i>PANELISTS</i> Robert W. Sharps, CFA, CEO and President, T. Rowe Price Zach Buchwald, Chairman and CEO, Russell Investments
10–10:30 a.m.	Central Park Ballroom	NETWORKING COFFEE BREAK
10:30 a.m.–noon	Metropolitan Ballroom	OUTLOOK FOR MARKETS AND INVESTMENT STRATEGIES <i>HOST</i> Lisa Abramowicz, Co-Anchor, Bloomberg Surveillance, Bloomberg Television and Radio <i>PANELISTS</i> David Kelly, CFA, PhD, Chief Global Strategist, J.P. Morgan Asset Management Jimmy C. Chang, CFA, Chief Investment Officer, Rockefeller Global Family Office Kathy Jones, Managing Director, Chief Fixed Income Strategist, Charles Schwab
Noon–1 p.m.		LUNCH
1–1:30 p.m.	Central Park Ballroom	EXHIBITOR VISITS
1:30–3 p.m.	Metropolitan Ballroom	OUTLOOK FOR U.S. AND GLOBAL ECONOMY IN 2024 <i>HOST</i> Katie Greifeld, Anchor, Bloomberg Markets, Bloomberg Television and Radio <i>PANELISTS</i> Blerina Uruçi, Chief U.S. Economist, T. Rowe Price Dana M. Peterson, Chief Economist, The Conference Board Matthew Luzzetti, Chief U.S. Economist, Deutsche Bank Michael Gapen, Managing Director, Chief U.S. Economist, BofA Global Research
3:30–5 p.m.	Central Park Ballroom	GLOBAL ASSET ALLOCATION AND PORTFOLIO RISK <i>MODERATOR</i> Brett Amendola, Partner and Wealth Manager, Wooster Square Advisors <i>PANELISTS</i> Celia Dallas, Partner, Chief Investment Strategist, Cambridge Associates Jason Draho, Head of Asset Allocation Americas, UBS Global Wealth Management Sébastien Page, CFA, CIO and Head of Global Multi-Asset, T. Rowe Price Stacey Gilbert, Chief Investment Officer, Glenmede Investment Management

Agenda Day Two



TIME	VENUE	SESSION
5:30-7:30 a.m.	Lenox	BREAKFAST
8-9 a.m.		ATTEND ONE OF THE FOLLOWING SESSIONS
	New York Ballroom East	● OPPORTUNITIES AND CHALLENGES IN INVESTMENT BANKING INDUSTRY IN 2024 Larry Hamdan, Head of M&A – Americas, Barclays
	Empire Ballroom West	● SUSTAINABLE INVESTMENT, ESG AND IMPACT <i>MODERATOR</i> Geraldyn Endo, Relationship Manager, Members Exchange <i>PANELISTS</i> Amber Knee, Social Impact Director, Real Estate, Nuveen – TIAA Gayle Peterson, CEO, PFC Social Impact Advisors/Associate Fellow, Director, Oxford Impact Investing and Social Finance Programs, Oxford Rob Du Boff, CFA, Senior ESG Analyst, Bloomberg Intelligence Steve Norcini, Head of Sustainable Investing, Wilmington Trust – M&T Bank
	Riverside Ballroom	● HOW TO START YOUR CAREER AFTER COLLEGE <i>MODERATOR</i> Jill A. Koehler, Associate Dean for Career Development, Quinnipiac University <i>PANELISTS</i> Hannah Del Vecchio, Vice President, Transaction Banking, Goldman Sachs Joe Lehocky, Vice President: Campus Recruitment, HR, Credit Agricole CIB Katie Strong, Campus Recruiting Manager, Morgan Stanley Lauren Reinfeld, Campus Recruiting and Program Manager, Millennium
	Metropolitan Ballroom West	● HOW AI IS SHAPING THE ASSET MANAGEMENT INDUSTRY'S BUSINESS AND OPERATION <i>HOST</i> Gaetano "Tony" DiPietro, Managing Director of Corporate Strategy and Head of Client Relations, Piedmont Fund Services <i>PANELISTS</i> Jordan Vinarub, Head of the New York City Technology Development Center, T. Rowe Price Sal Cucchiara, Managing Director, CIO and Head of Wealth Management Technology, Morgan Stanley Tom Eck, Senior VP, CIO, Head of AI, Digital Transformation, Fiserv
	Empire Ballroom East	● OUTLOOK FOR FIXED INCOME AND OTHER MARKETS IN A HIGH INTEREST RATE ENVIRONMENT <i>MODERATOR</i> Rebecca Ungarino, Senior Finance Reporter <i>PANELISTS</i> Jitania Kandhari, Deputy CIO – Solutions & Multi-Asset Group, Portfolio Manager - AIA, Head of Macro and Thematic Research – Emerging Markets, Morgan Stanley Peter Oades, Senior Vice President, Chief Investment Officer, Aetna, a CVS Health Company Robert Tipp, CFA, Chief Investment Strategist, Head of Global Bonds, PGIM Fixed Income
9:15-10:15 a.m.		ATTEND ONE OF THE FOLLOWING SESSIONS
	Riverside Ballroom	● IMPACTS OF THE GEOPOLITICAL LANDSCAPE ON THE GLOBAL ECONOMY, MARKETS AND SUSTAINABILITY Jason McMann, PhD, Head of Political Intelligence, Morning Consult Poonam Arora, PhD, Associate Dean of Faculty, Quinnipiac University School of Business

TIME	VENUE	SESSION
9:15-10:15 a.m. (cont.)	Empire Ballroom East	<ul style="list-style-type: none"> ● THE FUTURE OF ACTIVE PORTFOLIO MANAGEMENT VS. PASSIVE PORTFOLIO MANAGEMENT <p><i>MODERATOR</i> Raymond Bovich, CFA, Partner/Wealth Manager, Wooster Square Advisors</p> <p><i>PANELISTS</i> Bobby Barnes, Head of Quantitative Index Solutions, Fidelity Jasmine Fan, CFA, Vice President, BlackRock iShares Investment Strategy Team Noah Kroll, CIMA, Remi Product Specialist, Allspring Global Investments</p>
	New York Ballroom East	<ul style="list-style-type: none"> ● WEALTH MANAGEMENT STRATEGIES: CHALLENGES AND OPPORTUNITIES <p><i>MODERATOR</i> Ted Koly, Financial Advisor, Morgan Stanley</p> <p><i>PANELISTS</i> Joseph Chu, CFP, Managing Director, Financial Advisor, Senior Portfolio Manager, RBC Wealth Management Marti Marache, Founder and CEO, Harbor Asset Private Wealth</p>
	Empire Ballroom West	<ul style="list-style-type: none"> ● OPTION STRATEGIES FOR INCOME GENERATION AND RISK MANAGEMENT <p>Joe Burgoyne, Chief Strategist, Delphian Trading Joshua Smithberger, Chief Trading Strategist, System Soft Technologies Kevin Luthringshausen, Senior Vice President, Tradier Inc.</p>
	Metropolitan Ballroom West	<ul style="list-style-type: none"> ● INVESTMENT STRATEGIES IN REAL ESTATE <p><i>MODERATOR</i> Peter Falcone, Partner and CFO, Stone Capital Investors</p> <p><i>PANELISTS</i> John Colella, Vice President, Investments, Merit Hill Capital Yury Marasanov, CFA, Director, Private Credit, Angelo Gordon</p>
10:30-11 a.m.	Central Park Ballroom	NETWORKING COFFEE BREAK
11 a.m.-noon		ATTEND ONE OF THE FOLLOWING SESSIONS
	Empire Ballroom East	<ul style="list-style-type: none"> ● INVESTING IN ALTERNATIVES: OUTLOOK FOR 2024 <p><i>MODERATOR</i> Christie Hamilton, Director of Research and Content, CAIA Association</p> <p><i>PANELISTS</i> Doug Keller, Head of Alternatives in U.S. Intermediaries, T. Rowe Price Lara Rhame, Chief U.S. Economists, FS Investments</p>
	Empire Ballroom West	<ul style="list-style-type: none"> ● CORPORATE INVESTMENT BANKING <p>Al Capra, Managing Director, Head of Insurance Banking, Sumitomo Mitsui Banking Corporation (SMBC) Marlee Silverman, Analyst, Global Financial Institutions Group, Sumitomo Mitsui Banking Corporation (SMBC)</p>
	Riverside Ballroom	<ul style="list-style-type: none"> ● THE IMPORTANCE OF INVESTOR RELATIONS IN ASSET MANAGEMENT <p><i>MODERATOR</i> Alexandar V. Laskin, Professor of Public Relations, Quinnipiac University</p> <p><i>PANELISTS</i> Lori Chaitman, Global Head of Investor Relations, Kyndryl Matt D'Alto, VP and Head of Research, Corbin Advisors Matthew Brusch, CAE, President and CEO, NIRI, The Association of Investor Relations</p>

TIME	VENUE	SESSION
11 a.m.–noon (cont.)	New York Ballroom East	<p>● WOMEN IN FINANCE AND ITS FUTURE</p> <p><i>MODERATOR</i> Dayna Blechman, VP, Head of Business Operations, NBA</p> <p><i>PANELISTS</i> Hannah Del Vecchio, Vice President, Transaction Banking, Goldman Sachs Jessica Iorio, Divisional Operations Director, Rockefeller Global Family Office Jessica Tomkiewicz, Business Manager & COO, Stackman, Casriel Group, UBS Samantha Merwin, CFA, Head of Advocacy, BlackRock Global Markets</p>
	Metropolitan Ballroom West	<p>● THE STATE OF THE HEDGE FUND INDUSTRY AND HOW TO GET A JOB AND KEEP IT!</p> <p>Evan H. Katz, Managing Director, Crawford Ventures Inc.</p>
11 a.m.–2 p.m.	Central Park Ballroom	CAREER NETWORKING
Noon–2 p.m.		LUNCH
2–4:30 p.m.	New York Ballroom West	<p>PORTFOLIO COMPETITION POSTER SESSIONS</p> <p>Judges' visit 2:30–4 p.m.</p>
2–3 p.m.		ATTEND ONE OF THE FOLLOWING SESSIONS
	Metropolitan Ballroom West	<p>● MACHINE LEARNING DRIVEN INVESTMENT: HOW TO USE AI AS AN INVESTMENT TOOL</p> <p>Arezu Moghadam, PhD, Managing Director, Global Head of Data Science, J.P. Morgan Asset Management</p>
	Empire Ballroom East	<p>● INVESTING IN DIGITAL ASSETS AND ITS FUTURE OUTLOOK</p> <p><i>MODERATOR</i> Tan Gürpınar, PhD, Assistant Professor of Business Analytics, Quinnipiac University</p> <p><i>PANELISTS</i> David Han, Institutional Research Analyst, Coinbase Jamie Pielock, Head of Business Development, EDX Markets Masha Leonov, Business Development, FalconX Michael Silberberg, Head of Investor Relations, AltTab Capital</p>
	Empire Ballroom West	<p>● COVERING WALL STREET</p> <p><i>MODERATOR</i> Sara Silver, Alan Abelson Endowed Professor of Business Journalism & Financial Communication, Quinnipiac University</p> <p><i>PANELISTS</i> Lauren Tara LaCapra, Wall Street Reporter, The Information Rebecca Ungarino, Senior Finance Reporter, Business Insider Sujeet Indap, Wall Street Editor, The Financial Times</p>
	Riverside Ballroom	<p>● LIFE IN THE WORKFORCE</p> <p>Amanda Morales, Financial Representative, National Financial Network Dennis Kilic, Senior Manager, Credit Research, Aetna, a CVS Health Company Megan Martucci, Commercial Analyst, Henkel Mete Seker, Vice President, Securitization, Credit Agricole Taylor Zografakis, Senior Analyst, Millennium</p>
	New York Ballroom East	<p>● EQUITY RESEARCH STRATEGIES</p> <p>Craig Siegenthaler, CFA, Managing Director, Head of Asset Managers, Brokers & Exchanges, Bank of America Marilyn Rowland, Senior Research Analyst, Fiducient Advisors Michael Zaremski, Managing Director, BMO Capital Markets</p>

TIME	VENUE	SESSION
3:30-4:30 p.m.	ATTEND ONE OF THE FOLLOWING SESSIONS	
Metropolitan Ballroom West	● FINTECH & INNOVATION AND ITS FUTURE	<p><i>HOST</i> Gaetano "Tony" DiPietro, Managing Director of Corporate Strategy and Head of Client Relations, Piedmont Fund Services</p> <p><i>PANELISTS</i> Kristen Castell, Managing Director, Center for Accelerating Financial Equity (CAFE) Stefania Di Bartolomeo, Founder, CEO, Physis Investment Tim Rodgers, Lead - Private Market Tokenization, The Depository Trust & Clearing Corporation (DTCC)</p>
Empire Ballroom East	● ANALYZING GROWTH AND OPPORTUNITIES IN OPTIONS	<p><i>MODERATOR</i> Joe Burgoyne, Chief Strategist, Delphian Trading</p> <p><i>PANELISTS</i> Ashok Yarlagadda, Founder, Delphian Trading Brian Gilbert, Director, Options Business Development, NYSE Gary Franklin, Vice President, Head of Options Trading & Strategies, Global Wealth Solutions, Raymond James Kevin Luthringshausen, Senior Vice President, Tradier Inc.</p>
New York Ballroom East	● BEST PRACTICES ON CREATING AND TEACHIING A STUDENT-MANAGED INVESTMENT FUND	<p><i>MODERATOR</i> Mary Papazian, Managing Director, Capital Markets Lab, Assistant Professor of Finance, Merrimack College</p> <p><i>PANELISTS</i> Andrea J. Heuson, PhD, Professor of Finance and Academic Director of Real Estate Programs, University of Miami Elvan Aktas, PhD, Professor of Finance, Valdosta State University Suzanne K. Hayes, PhD, Professor of Finance, University of Nebraska-Kearney William M. Billik, PhD, JD, Assistant Professor of Finance, Kent State University</p>
Empire Ballroom West	● HOW TO USE AI IN TEACHING AND RESEARCH ASSESSMENT	<p><i>MODERATOR</i> Robert M. Yawson, PhD, Professor of Management, Entrepreneurship & Strategy, Quinnipiac University</p> <p><i>PANELISTS</i> Bertrand Guillotin, PhD, Associate Professor & Academic Director, IB (BBA) Program, Principal Investigator/Project Director, CIBER Temple University David Steingard, PhD, Associate Professor, Director, SDG Dashboard, Associate Professor of Management, Saint Joseph's University Margaret A. Goralski, PhD, Associate Professor of Entrepreneurship & Strategy, Quinnipiac University</p>
Riverside Ballroom	● FINANCE DESIGNATIONS	<p><i>MODERATOR</i> Steven Novakovic, CAIA, CFA, Managing Director, CAIA</p> <p><i>PANELISTS</i> Lisa S. Ponti, Vice President, Educational Outreach, GARP Rob Langrick, CFA, CIPM, General Manager, CFA Program, CFA Institute Stanley Dash, CMT, Program Director, CMT Association</p>
5-6 p.m.	GLOBAL PORTFOLIO COMPETITION WINNERS - RECEPTION	

We are proud to support
Quinnipiac University GAME Program.

The Dunn-Dunne-Wall Group

Peter Dunne

Managing Director

Senior Financial Advisor

301.215.4447

peter.dunne@ml.com

Merrill Lynch Wealth Management

7501 Wisconsin Avenue

Suite 600W

Bethesda, MD 20814



Merrill Lynch, Pierce, Fenner & Smith Incorporated (also referred to as "MLPF&S" or "Merrill") makes available certain investment products sponsored, managed, distributed or provided by companies that are affiliates of Bank of America Corporation ("BoFA Corp."). MLPF&S is a registered broker-dealer, registered investment adviser, Member SIPC and a wholly owned subsidiary of BoFA Corp.

Investment products: **Are Not FDIC Insured** **Are Not Bank Guaranteed** **May Lose Value**

The Bull Symbol and Merrill are registered trademarks of Bank of America Corporation.

© 2024 Bank of America Corporation. All rights reserved.

MAP5272720 | AD-02-24-0442 | 470944PM-0123 | 02/2024

Make it your business to grab the bull by the horns.

In the Quinnipiac University School of Business, we see more than a student. We see someone who will impact the world.

From the construction of our new 79,000-square-foot, state-of-the-art School of Business facility to the development of meaningful experiences that enhance learning, we provide the foundation to position our students for lifelong success. Every step of the way, we are invested in your future as a bold leader who will thrive in the evolving global environment.

Our commitment to helping students pursue their passion is clear. Over the past five years, we've boasted a proven track record with a 99% post-graduation placement rate, and recently added a STEM designated Financial Technology (FinTech) major to our vast lineup of programs.

If you have a passion for business, we'll provide the tools for success. Together, we'll pursue work that matters.

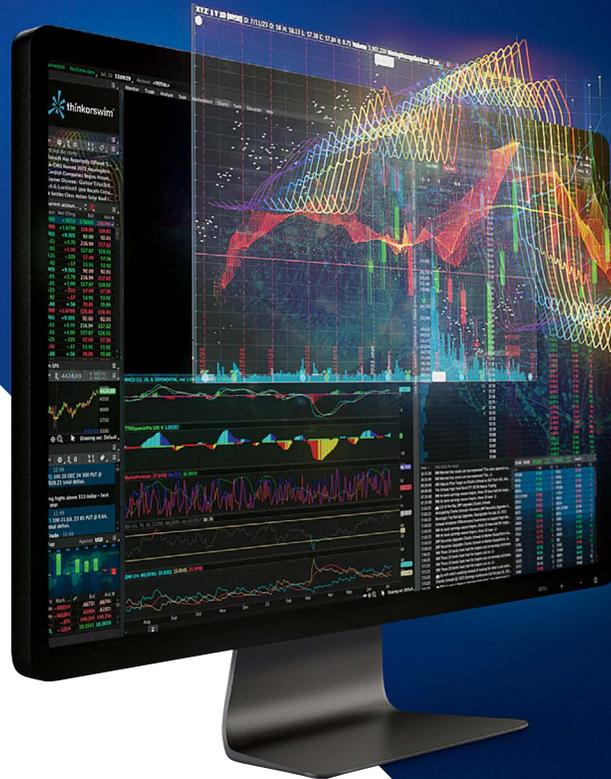
Ambition

UNLEASHED

Quinnipiac
School of Business



TRADE BRILLIANTLY



thinkorswim® is now at Schwab.

Our award-winning thinkorswim trading platforms are loaded with powerful features that let you dive deeper into the market.

- Visualize your trades in a new light on thinkorswim desktop with robust charting and analysis tools, including 400+ technical studies.
- Uncover new opportunities with up-to-the-minute market news and insights.
- Choose a platform to fit your trading style—from streamlined to advanced.
- Available on desktop, web, and mobile to meet you where you are so you never miss a thing.

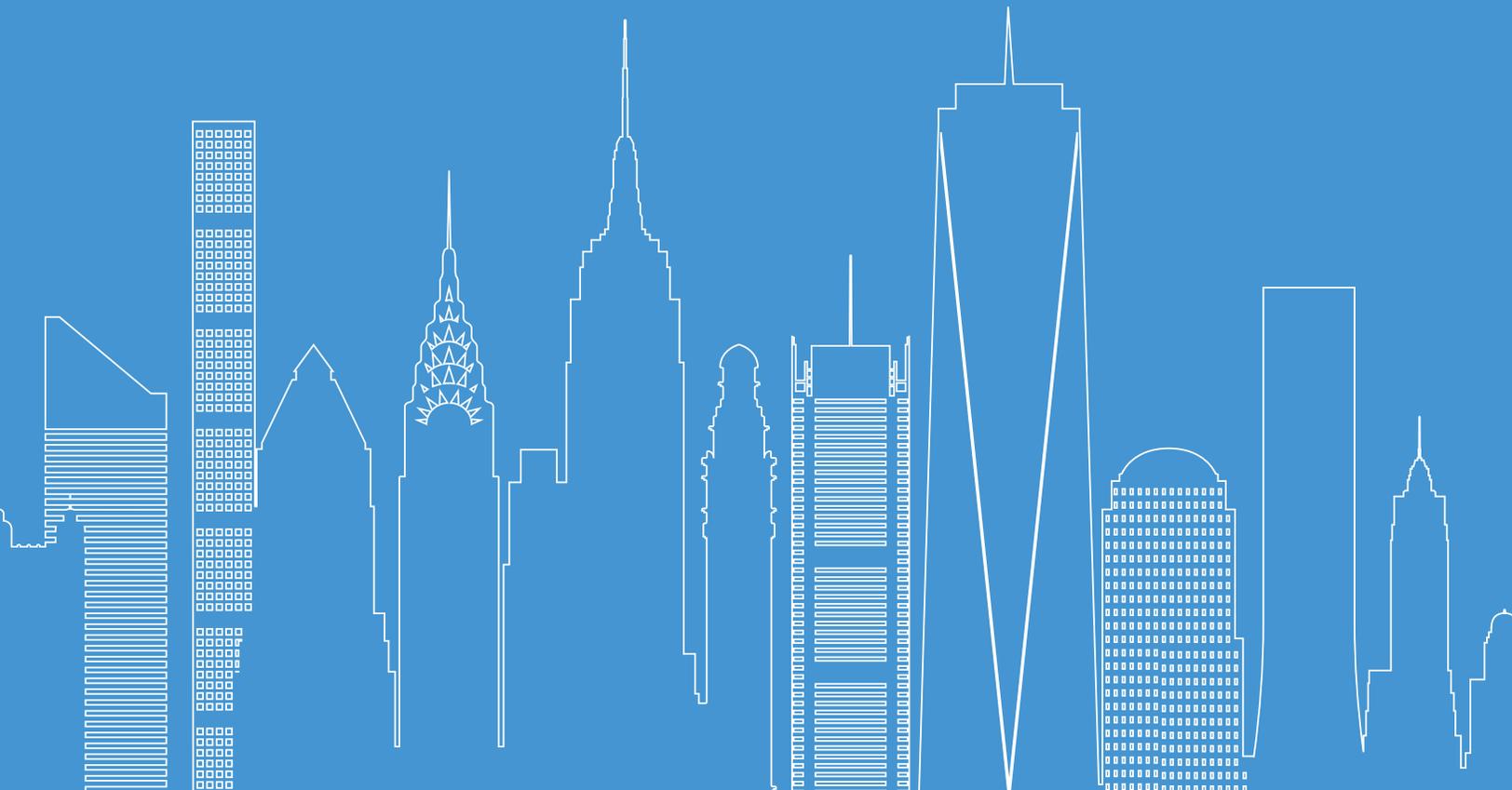
Built by the trading-obsessed, so you can trade brilliantly.



Investing involves risks, including loss of principal.
Schwab does not recommend the use of technical analysis as a sole means of investment research.
© 2024 Charles Schwab & Co., Inc. All rights reserved. Member SIPC. (1023-373U) ADP121824-00

[Schwab.com/Trading](https://www.schwab.com/trading)

Keynote Speakers





Lisa Abramowicz

Co-Host, Bloomberg Television and Radio

Lisa Abramowicz co-hosts “Bloomberg Surveillance” on Bloomberg Television and Bloomberg Radio. She previously co-hosted “Bloomberg Markets” from 10 a.m.–noon EST on Bloomberg Radio and was a member of Bloomberg Television’s on-air markets desk. She also served as a columnist and reporter at Bloomberg focusing on fixed-income markets.

Abramowicz graduated from the University of Chicago.



Brett Amendola

*Managing Partner, Wooster Square Advisors
Quinnipiac University Board of Trustees member*

Brett M. Amendola has successfully leveraged his more than 30 years of experience at some of the world’s largest investment firms. He has attracted successful financial industry professionals to work side by side with some of the brightest minds graduating from colleges and universities, creating a team with extensive knowledge and experience while providing world-class financial advice and continuity of service to professionals and multi-generational business owner clients. Amendola holds the Series 6, 7, 9, 10, 24, 63, 65 and state life and health licenses and is a member of GAMA International. He has been the recipient of numerous awards and honors, including Quinnipiac University’s Outstanding Business Alumni Inaugural Recipient – 2008 and the Hartford Business Journal 40 Under 40 Award in 2008. Amendola earned a bachelor’s degree in financial management from Quinnipiac University and serves on Quinnipiac’s Board of Trustees.



Bobby Barnes

Head of Quantitative Index Solutions, Fidelity Investments

Bobby Barnes is head of the Quantitative Index Solutions (QIS) group at Fidelity Investments. Fidelity Investments is a leading provider of investment management, retirement planning, portfolio guidance, brokerage, benefits outsourcing and other financial products and services to institutions, financial intermediaries and individuals.

QIS designs and manages proprietary indices covering equity, fixed income and multi-asset class investment vehicles. The index solutions created by the QIS group enable shareholders to gain unique market exposures via factor or thematic indices that leverage Fidelity’s proprietary investment insights.

Prior to assuming his current position, Barnes was a quantitative analyst responsible for conducting alpha research to generate stock ideas. He also advised portfolio managers on portfolio construction techniques to manage risk.

Prior to joining Fidelity as a quantitative intern in 2008, Barnes worked as a systems engineer at Freescale Semiconductor and at NASA Ames Research Center. He has been in the financial industry since joining Fidelity full time in 2009.

Barnes earned his Bachelor of Science, summa cum laude, in Electrical Engineering from North Carolina State University and his Master of Science, magna cum laude, in Electrical Engineering from Stanford University. Additionally, he earned his Master of Business Administration from Harvard Business School.



Zach Buchwald

Chairman and Chief Executive Officer, Russell Investments

Zach Buchwald is Chairman and Chief Executive Officer of Russell Investments. Buchwald is responsible for driving Russell Investments’ strategy and results at a time when the firm’s customized, client-focused approach directly aligns with the need for specialized portfolio solutions.

Buchwald joined Russell Investments in 2023 from BlackRock, where he served as the head of its \$2 trillion Institutional Business. Earlier he led BlackRock’s Financial Institutions Group and helped establish its Retirement Solutions and Financial Markets Advisory platforms. Prior to this, Buchwald served as a managing director at Morgan Stanley, where he led the bank’s collateralized loan obligation (CLO) business.

Buchwald frequently addresses the challenges of financial security and retirement in his thought leadership and commentary, which has been featured in Newsweek and Fortune. He is a graduate of Harvard University and lives with his family in Seattle.

Keynote Speakers *continued*



Al Capra

Managing Director and Head of Insurance Banking, Sumitomo Mitsui Banking Corporation

Al Capra recently joined Sumitomo Mitsui Banking Corporation (SMBC) as a Managing Director and Head of Insurance Banking within its Global Financial Institutions Group. With a career on Wall Street that spans 30+ years, Capra is recognized as a seasoned and trusted advisor to insurance industry executives.

Capra is responsible for delivering corporate and investment banking solutions to domestic and foreign insurance clients. Prior to joining SMBC in 2023, he served as a Managing Director within Banking Americas at Mizuho Americas for eight-plus years. Prior to joining Mizuho in 2015, Capra spent 9 years at Société Générale where, as a Senior Banker, he developed and led the firm's U.S. Insurance Practice across Coverage & Investment Banking and Global Markets. Prior to becoming a banker in 2006, Capra covered the insurance industry as a sell-side equity research analyst for over 13 years. He began his career at Salomon Brothers in 1990.

Capra serves as a member of the Board of Directors for the Brookville Center for Children's Services. He has also committed time toward high school and college mentoring opportunities, including the NY STEPS Youth Mentoring Program for the Office of the Mayor of NYC, Wall Street Bound Inc. and iMentor.



Jimmy C. Chang, CFA

Chief Investment Officer, Rockefeller Global Family Office

Jimmy C. Chang, CFA, is the chief investment officer of the Rockefeller Global Family Office. He is a member of the firm's management committee and a Chartered Financial Analyst®. Chang has spent more than 16 years with Rockefeller.

Before becoming CIO in 2020, he was the chief investment strategist and a senior portfolio manager where he co-managed several equity strategies and oversaw the Fixed Income group. Before joining Rockefeller in 2004, Chang was a senior vice president, chief technology strategist and senior technology analyst at the U.S. Trust Company of New York, where he led technology equity research and co-managed a technology fund. He previously served as a senior marketing representative and advisory systems engineer at International Business Machines (IBM) from 1985-94.

He earned his MBA in Finance and International Business from New York University and a BS in Electrical Engineering from The Cooper Union.



Sal Cucchiara

Managing Director and Chief Information Officer of Wealth Management and Investment Management Technology, Morgan Stanley

Sal Cucchiara is responsible for the IT strategy as well as the design, development, delivery and support of highly commercial systems that drive growth for all WM & IM business lines. This includes the newly acquired businesses of E*TRADE, Shareworks (Solium) and Eaton Vance. Cucchiara serves as the Head of Diversity and Inclusion for Technology and is a member of the WM Operating Committee.

Prior to joining Morgan Stanley in 2016, Cucchiara spent 20 years at Bank of America Merrill Lynch, where he was the Chief Information Officer and Head of the Wealth & Banking Solutions Technology organization. He is a board or advisory member at the Wall Street Technology Association, NewYorkCIO Advisory Board, the Hispanic IT Executive Council (HITEC), Year Up and the National Center for Women & Information Technology (NCWIT).

Cucchiara was named New York CIO of the Year in 2020, and his team has been recognized by the CIO 100, Banking Technology, Grace Hopper, American Financial Technology and Women in IT Awards.

Cucchiara is married to his wife, Jessica, and has two boys, Jack (23) and Bennett (11).



Celia Dallas

Chief Investment Strategist, Cambridge Associates

As chief investment strategist for Cambridge Associates, Celia Dallas is responsible for formulating its global investment strategy. Since joining Cambridge Associates in 1996, Dallas has contributed to research initiatives and publications covering a wide range of capital market and investment planning topics, including portfolio construction, endowment spending, liquidity management and tactical asset allocation. She is the author of its quarterly publication, *VantagePoint*, in which she shares its house view and advice. She is a frequent presenter and discussion moderator at the firm's roundtables and industry conferences.

Before joining Cambridge Associates, Dallas was a consultant for Harlan Brown & Co, a competitive intelligence consulting firm. In this position, she researched, wrote and presented market analysis commissioned by Fortune 500 clients on a variety of consumer and industrial products. She also worked for the Employee Benefit Research Institute (EBRI), where she conducted research on retirement income security issues.

She has an MBA from the Darden School of Business at the University of Virginia and a BA from the University of Pennsylvania. She is a board member at Virginia Environmental Endowment.



Matt D'Alto

Head of Research, Corbin Advisors

Matt D'Alto is Head of Research at Corbin Advisors. He has 30 years of finance experience, including 20 years on the buy side as a senior analyst and portfolio manager across several long-only institutional money managers such as TimesSquare Capital Management, J&W Seligman and Putnam Investments. Through his capital markets experience, he regularly met and communicated with senior management teams and investor relations officers of hundreds of U.S.-based companies across different sectors and market capitalization. Prior to joining Corbin, he was Director of Research at Guidepoint, a global expert network, in charge of all research and buy-side content development in the enterprise software space.



Stefania Di Bartolomeo

Founder and CEO, Physis Investment

Stefania Di Bartolomeo founded Physis with a vision to disrupt the financial system and empower investors to have an impact. As CEO, Di Bartolomeo has developed Physis from an idea to an award-winning wealth management platform.

A skilled portfolio manager, Di Bartolomeo has advised institutional investors with \$90 billion in assets on sustainable portfolio implementation. Previously, Di Bartolomeo worked at Sella SGR as the youngest impact investing fund manager in Europe. She managed a multi-asset global allocation fund which grew from \$16 million to \$100 million of assets under management in two years. Di Bartolomeo was also the first fund manager to provide a methodology for impact reporting, reaching over 6,000 individual investors with her report.

Di Bartolomeo serves as a mentor for Harvard University's Undergraduate Women in Business community and as a global strategy director for Harvard Alumni Entrepreneurs. Previously, she served as President of the Harvard Environmental Club and as a member of the Harvard Sustainable Leadership Council. She has also published two books on sustainable finance and given guest lectures on sustainable investing at universities around the world.

Di Bartolomeo received her undergraduate degree in economics and finance from Bocconi University in Italy and earned a master's degree in sustainability from Harvard.

Keynote Speakers *continued*



Gaetano "Tony" DiPietro

Head of Corporate Strategy and Client Relations, Piedmont Fund Services

Tony DiPietro is the Head of Corporate Strategy and Client Relations at Piedmont Fund Services, responsible for developing and executing strategic initiatives across the organization while optimizing operations, enhancing client services and improving financial performance.

DiPietro held several roles at BlackRock Inc. from 2003–19. He was a founding member and COO of the newly formed Fund of Hedge Fund Business (FOF) division. He provided leadership in the growth of the business which launched with \$200 million in assets and grew to \$3 billion across 8+ types of products. DiPietro also developed the new client service team at BlackRock Inc., responsible for servicing the firm's top 100 institutional clients. While developing the group, he further identified new client solutions and offered thought leadership to clients directly. Prior to joining Piedmont, DiPietro was Executive Director at S&P Global where he led the global customer service team for the tax solutions group within the Platforms and Regulatory Compliance (PRC) business.

DiPietro is a graduate of Quinnipiac University with a bachelor's degree in international business. DiPietro resides in the greater Boston area with his wife and children.



Jason Draho, PhD

Head of Asset Allocation Americas, UBS Global Wealth Management

Jason Draho is a Managing Director and Head of Asset Allocation Americas for UBS Global Wealth Management. He is the Chair of the U.S. Investment Strategy Committee. In this capacity, Draho oversees the strategic and tactical asset allocation recommendations for approximately \$1.7 trillion in invested assets. He is also responsible for the UBS House View suite of 43 discretionary portfolios with over \$24 billion in assets.

Draho leads the U.S. investment process by developing analytical tools and working with asset class, thematic, private market and ESG experts to generate recommendations for financial advisors and clients. He has also published a number of widely read reports on IPOs and SPACs, analyzing the implications and opportunities for investors, business owners and executives.

He speaks frequently with financial advisors, clients and the media, including CNBC, Bloomberg and The WSJ, presenting UBS' views and specific investment recommendations.

Prior to joining UBS, Draho spent nine years at Morgan Stanley, eventually becoming the firm's Global Cross-Asset Strategist. He focused on global asset allocation for institutional clients, providing investment recommendations on equities, fixed income, currencies and commodities.

Draho holds a PhD in Economics from Yale University and a Bachelor of Science from the University of Manitoba.



Tom Eck

SVP of Digital Transformation, Fiserv

Tom Eck is Fiserv's Senior Vice President of Digital Transformation. Prior to Fiserv, Eck was the Global CTO of Industry Platforms and Financial Services at IBM, Head of Emerging Technologies at First Data and held technology leadership positions at CIT Group, Bank of America Merrill Lynch and The Associated Press, in addition to serving as founder of several tech startups.

His nearly 30 years' experience is powered by a BS in Chemistry, MS in Computer Science and MS in Biotechnology, and he is a dissertation away from a PhD in Computational Biology and Molecular Biophysics.

Throughout his career, Eck has been an active researcher in AI and deep learning. He likes to say that he got started in AI way back when it was "hard to do."

Eck is a recognized thought leader in AI as well as the FinTech and banking modernization fields and is active in the conference, podcast and blogging circuits.



Michael Gapen

Managing Director, Head of U.S. Economics, BofA Global Research

Based in New York, Michael Gapen is responsible for the firm's outlook for the U.S. economy, in particular U.S. monetary policy, the impact of financial markets on the economy and consumer spending behavior.

Gapen joined Bank of America in 2022 from Barclays, where he was head of U.S. Economics Research and, following his appointment as Asset Allocation Strategist in January 2012, took on additional responsibility for forming the firm's asset allocation views and marketing them to clients.

Gapen joined Barclays from the Board of Governors of the Federal Reserve, where he was a section chief responsible for monetary and financial market analysis. He assisted the Board and the FOMC in the formulation of monetary policy and the Federal Reserve's response to the financial crisis. Prior to that, he served as an economist with the International Monetary Fund.

Gapen has taught finance and economics at Indiana University, the University of Notre Dame and Johns Hopkins University. He has also guest lectured at the School of International and Public Affairs at Columbia University. He is a frequent commentator on news media outlets, including Bloomberg TV, CNBC and TV Tokyo, and is often cited in print and online media.



Stacey Gilbert

Chief Investment Officer, Portfolio Manager, Glenmede Investment Management

Stacey Gilbert is the chief investment officer of Glenmede Investment Management LP and co-portfolio manager of Derivatives. Gilbert oversees portfolio management, research and trading operations. She also shapes investment strategy and implementation.

Prior to joining Glenmede, Gilbert served as the head of derivative strategy at Susquehanna Financial Group. In this role, she led a team responsible for providing market commentary, actionable ideas, and trading strategies driven by catalyst events, breaking news and sector analysis. During her more than two decades at Susquehanna, she held several leadership positions including key senior positions on the trading desk and the American Stock Exchange. Gilbert also led the company's Education department.

Gilbert earned a Bachelor of Arts in Mathematics with a minor in economics from Dartmouth College.



Katie Greifeld

Reporter and Anchor, Bloomberg Media

Katie Greifeld anchors "Bloomberg Markets" at 10 a.m. ET daily and "ETF IQ" every Monday from New York. "Bloomberg Markets" focuses on the equity markets and single stock stories and features C-suite interviews. She will jointly host the daily "Wall Street Week" segment along with David Westin, host of "Wall Street Week."

In addition, Greifeld covers financial markets and exchange-traded funds for Bloomberg News with a focus on fixed income. Greifeld joined Bloomberg in 2016 after graduating from the Columbia University School of Journalism with a master's degree. She majored in political science at Haverford College.

Keynote Speakers *continued*



Larry Hamdan

Head of Mergers and Acquisitions, Americas, Barclays

Larry Hamdan is head of mergers and acquisitions for the Americas within the U.K. investment bank at Barclays. Based in New York, he is also a member of the Americas Banking Operating Committee.

Prior to joining Barclays in 2010, he worked for 21 years at Credit Suisse, where he was vice chairman of global mergers and acquisitions. He also served as the global co-head of the industrial group.

Hamdan has extensive experience advising numerous clients on more than \$500 billion of transactions, including Danaher on its \$21 billion acquisition of GE's BioPharma division, US Airways on its \$30 billion merger with American Airlines and TRW on its \$12 billion hostile defense and sale to Northrop Grumman. Hamdan has also advised numerous clients facing demands from hedge fund activists.

He earned an AB in Economics, magna cum laude, from Princeton University; a JD, magna cum laude, from Harvard Law School; and an MBA with high distinction from Harvard Business School, where he was a Baker Scholar.



Kathy Jones

Managing Director and Chief Fixed Income Strategist, Schwab Center for Financial Research

Kathy Jones is responsible for interest rate and currency analysis and fixed income education for Schwab clients and the public.

Prior to joining Schwab in 2011, Jones was a fixed income strategist at Morgan Stanley, where she specialized in global macro strategy covering domestic and international bonds and foreign exchange. She has also been a consultant in the alternative investment area and previously served as executive vice president of the Debt Capital Markets division of Prudential Securities.

Jones has analyzed global bonds, foreign currency and commodity markets extensively throughout her career as an investment analyst and strategist, working with both institutional and retail clients. She makes regular broadcast appearances on Bloomberg TV, Yahoo Finance and CNBC and is often quoted by The Wall Street Journal, The New York Times, The Financial Times and Reuters. She holds an MBA in Finance from the Kellogg Graduate School of Management at Northwestern University and a BA with honors in English Literature from Northwestern University.



Jitania Kandhari

Deputy CIO of the Solutions and Multi-Asset Group, Morgan Stanley

Jitania Kandhari is the deputy CIO of the Solutions and Multi-Asset Group, co-lead portfolio manager for the Active International Allocation Strategy, and head of macro and thematic research for the Emerging Markets Equity team at Morgan Stanley.

She joined Morgan Stanley in 2006 and has 24 years of investment experience in global macroeconomics, country and market analytics, currencies and thematic investments. Kandhari was named in Citywire's Top 20 Female Portfolio Managers in the U.S. for 2021.

Prior to joining the firm, Kandhari was an associate vice president in private banking at ABN AMRO (Royal Bank of Scotland). Kandhari began her career in India at First Global Securities in Indian equities.

She holds a Bachelor of Commerce in Advanced Financial and Management Accounting and an MMS in Finance, both from the University of Mumbai.



Evan Katz

Managing Director, Crawford Ventures Inc.

Evan Katz is Managing Director of Crawford Ventures Inc., a leading Manhattan-based alternative asset investment firm that forms, grows, holds interests in and raises substantial investor capital for compelling hedge funds, private equity funds and other alternative investment funds. Katz was voted by the hedge fund industry as its best fundraiser, for all of the three most recent consecutive years, in the annual Hedgeweek awards.

Katz has worked on Wall Street since 2003 and is highly regarded as an expert on alternative asset best practices, institutional investors, family offices and successful large-scale fundraising.

Katz was twice-elected to the Hedge Fund Association (HFA) Board of Directors and served from 2014–19. Prior, he served on the HFA Advisory Board from 2012–14 and received the Young Leadership Award at the 2011 Hedge Fund Summit. Katz has been quoted numerous times in the hedge fund and finance press and is a frequent featured speaker and panelist at leading hedge fund conferences, symposia and webinars. Katz supports numerous hedge fund, Wall Street and other philanthropic causes, including Hedge Funds Care / Help For Children.

Katz lives in New York with his wife Ruth, an executive director at Morgan Stanley, and their daughter.



David Kelly, CFA, PhD

Chief Global Strategist, J.P. Morgan Asset Management

David Kelly, CFA, is chief global strategist and head of the Global Market Insights Strategy team for J.P. Morgan Asset Management. With more than 20 years of experience, Kelly provides valuable insight and perspective on the economy and markets to thousands of financial advisors and their clients.

Throughout his career, Kelly has developed a unique ability to explain complex economic and market issues in a language that financial advisors can use to communicate with their clients. He is a keynote speaker at many national investment conferences and a frequent guest on CNBC and other financial news outlets.

Before joining J.P. Morgan Asset Management, he was an economic advisor to Putnam Investments. He also has served as a senior strategist/economist at SPP Investment Management, Primark Decision Economics, Lehman Brothers and DRI/McGraw-Hill.

Kelly is a CFA® charterholder. He has an MA and PhD in Economics from Michigan State University and a BA in Economics from University College Dublin in Ireland.



Debra Liebowitz, PhD

Provost, Quinnipiac University

In her three years at Quinnipiac, Debra Liebowitz has played a key role in earning Board of Trustees support for unprecedented investments in academic facilities and faculty hiring. These initiatives include a new School of Business and a strategic faculty hiring initiative to build distinctive academic offerings, promote interdisciplinary collaborations and advance the recruitment, retention and success of underrepresented faculty and students.

Both at Quinnipiac and at Drew University, where she previously served as provost and dean of the College of Liberal Arts and Caspersen School of Graduate Studies, Liebowitz has a long history of developing partnerships with industry, community organizations and other colleges and universities. She is currently leading the academic components of a unique university-wide strategic partnership between Quinnipiac and Hartford HealthCare that includes internship, employment and clinical placement opportunities for students. She is also the PI on a U.S. Small Business Administration grant (2022–24) partnering with the Connecticut Community Outreach Revitalization Program (ConnCORP) to create an adult entrepreneurship academic program for minority, women and veteran small business owners.

Liebowitz serves on the editorial board of the Journal of Human Rights and is on the Diversity, Equity and Inclusion Global Advisory Board of the Future Talent Council.

Keynote Speakers *continued*



Matthew Luzzetti

Chief U.S. Economist and Head of U.S. Economic Research, Deutsche Bank

Matthew Luzzetti is Chief U.S. Economist and Head of U.S. Economic Research at Deutsche Bank in New York. He was previously an economist in DB's Office of the Chief Economist in London. In 2017, Matthew was named to Business Insider's Rising Stars on Wall Street Under 35. His research has appeared in several books on economic policy and in refereed macroeconomics journals.

Luzzetti holds a PhD in Economics from the University of California, Los Angeles. While at UCLA, he worked at the U.S. Department of the Treasury in the Office of Financial Research. Prior to graduate school, he spent two years as a research analyst in the macroeconomics department at the Federal Reserve Bank of Philadelphia.



Arezu Moghadam, PhD

Managing Director, J.P. Morgan Asset Management

Arezu Moghadam is a Managing Director and Global Head of Data Science in Asset Management. Moghadam leads the development of artificial intelligence and machine learning methods to drive innovative solutions for data-driven investment decision-making, improved client engagement and operational efficiencies.

Moghadam has held numerous data science leadership positions with top-tier asset management firms for more than 13 years. Moghadam joins JPMAM from Point72 where she was Head of Quantitative Analytics for its Market Intelligence unit. Previously, Moghadam was Lead Quantitative Investment Researcher at Stone Ridge Asset Management. Moghadam also has held leadership roles in OpenheimerFunds' Global Multi-Asset Group and Goldman Sachs' Global Portfolio Solutions.

Moghadam has a PhD and Master of Philosophy in Computer Science & Mathematics from Columbia University, as well as a master's in Electrical, Electronics and Communication Engineering from the University of Pennsylvania.



Peter Oades

Senior Vice President and Chief Investment Officer, Aetna Inc.

Peter Oades oversees and directs Aetna's over \$34 billion diversified investment portfolio as well as the \$5.4 billion pension assets. Oades also manages Aetna's large case pension and long-term care operations.

Prior to his appointment as chief investment officer, Oades directed the fixed income portfolio management group of Aetna since February 2008. He was responsible for Aetna's \$20 billion fixed income group, overseeing the portfolio management of both short-term and long-term fixed income investments. Previously, Oades was the Senior Portfolio Manager responsible for managing Aetna's emerging market bond portfolio. Oades has been responsible for managing asset-backed, investment-grade corporate and high-yield bond portfolios. He joined Aetna as an associate actuary in the investment risk management group, later moving into portfolio management. Before his career at Aetna, Oades worked in various actuarial positions at both The Travelers and The Hartford.



Sébastien Page, CFA

Head of Global Multi-Asset and Chief Investment Officer, T. Rowe Price

Sébastien Page, CFA, is head of global multi-asset and chief investment officer at T. Rowe Price, where he oversees a team of investment professionals dedicated to a broad set of multi-asset portfolios. He is a member of the asset allocation committee responsible for tactical investment decisions across asset allocation portfolios. His multi-asset team manages \$407 billion as of Aug. 31, 2022, including \$337 billion in target date retirement products. He is also a member of the Management Committee.

Prior to joining T. Rowe Price in 2015, Page was an executive vice president at PIMCO, where he led a team focused on research and development of multi-asset solutions. Prior to that, he was a senior managing director at State Street Global Markets.

Page is the author of “Beyond Diversification: What Every Investor Needs to Know About Asset Allocation” (McGraw Hill, 2020) and the co-author of the book “Factor Investing and Asset Allocation” (CFA Institute Research Foundation, 2016). He is a member of the editorial board of The Journal of Portfolio Management and Financial Analysts Journal and the Research Committee of the Institute for Quantitative Research in Finance (Q Group).



Dana Peterson

Chief Economist and Leader of the Economy, Strategy and Finance Center, The Conference Board

Dana M. Peterson is the chief economist and leader of the Economy, Strategy and Finance Center at The Conference Board. Prior to this, she served as a North America economist and later as a global economist at Citi, the world’s largest investment bank. Her wealth of experience extends to the public sector, having also worked at the Federal Reserve Board in Washington, D.C.

Peterson’s wide-ranging economics portfolio includes analyzing global themes having direct financial market implications, including monetary policy, inflation, labor markets, fiscal and trade policy, debt, taxation, ESG, consumption and demographics. Her work also examines myriad U.S. themes leveraging granular data.

Peterson’s research has been featured by U.S. and international news outlets, both in print and broadcast. Publications and networks include CNBC, FOX Business, Bloomberg, Thomson Reuters, CNN Finance, Yahoo Finance, TD Ameritrade, Barron’s, The Financial Times and The Wall Street Journal. She is a member of the Board of Directors of NBER, NABE and the Global Interdependence Center; the 1st Vice Chair of the New York Association for Business Economics (NYABE); and a member of NBEIC, the Forecasters Club and the Council on Foreign Relations.



Holly J. Raider, PhD

Dean, School of Business, Quinnipiac University

Holly J. Raider is leading the Quinnipiac School of Business in planning a state-of-the-art new building, launching executive education and innovative new programs such as FinTech and Sport and Entertainment Management, and leading the capital campaign for the school. She serves on the executive committee of the partnership between Quinnipiac and Hartford HealthCare. Dean Raider is a member of the AACSB Business Practices Council.

An award-winning educator, Dean Raider has advanced the access, quality and impact of business education in a career spanning several distinguished business schools, including the Kellogg School of Management at Northwestern University, the Booth School of Business at the University of Chicago and INSEAD in France. Dean Raider has more than 25 years of experience as an educator and leader of collaborative global partnerships with corporations, government, healthcare systems, professional sports organizations and international universities.

Dean Raider is an expert in strategy, leadership change, business transitions and stakeholder engagement in high-stakes, turn-around situations. Dean Raider’s article “How to Strengthen Your Network When You are Just Starting Out” was featured in HBR’s special issue on the New Rules of Networking. Dean Raider was honored with a teaching award from Northwestern’s Business Institutions Program and a Northwestern Wildcat Excellence Award.

Keynote Speakers *continued*



Robert W. Sharps, CFA

Chief Executive Officer and President, T. Rowe Price

Robert Sharps is the chair of T. Rowe Price Group Inc.'s Executive, Management, and Management Compensation and Development Committees, and he has been a director since January 2022.

Sharps has been with T. Rowe Price since 1997, beginning as an analyst specializing in financial services stocks, including banks, asset managers and securities brokers, in the U.S. Equity Division. In 2016, Sharps assumed an investment leadership position as co-head of Global Equity, when he joined the Management Committee.

In February 2021, Sharps became president of T. Rowe Price Group; he was named chief executive officer in January 2022. Prior to T. Rowe Price, he interned as an equity research analyst at Wellington Management, and he was employed by KPMG Peat Marwick as a senior management consultant, where he focused on corporate transactions, before leaving to pursue his MBA in 1995. He also has earned the Chartered Financial Analyst® designation.

Sharps serves on the board of directors of the Baltimore Curriculum Project. He previously served on the St. Paul's School board of trustees and was chair of the investment committee from 2015–20. He also spent six years on Towson University's College of Business and Economics alumni advisory board.



Robert Tipp, CFA

Managing Director, Chief Investment Strategist and Head of Global Bonds, PGIM Fixed Income

Robert Tipp, CFA, is a managing director, chief investment strategist and head of global bonds at PGIM Fixed Income. Tipp is also one of the co-heads on the Multi-Sector Team. Tipp has worked at the firm since 1991 and held various senior investment manager and strategist roles.

Prior to joining the firm, he was a director in the Portfolio Strategies Group at the First Boston Corporation, where he developed, marketed and implemented strategic portfolio products for money managers. Before that, he was a senior staff analyst at the Allstate Research and Planning Center and managed fixed income and equity derivative strategies at Wells Fargo Investment Advisors. He received a BS in Business Administration and an MBA from the University of California, Berkeley. Tipp also holds the Chartered Financial Analyst (CFA) designation.



Blerina Uruçi

Chief U.S. Economist, T. Rowe Price Fixed Income Division

Blerina Uruçi is a U.S. economist in the Fixed Income Division at T. Rowe Price. She contributes to the formulation of investment strategy and supports investment and client development activities throughout the firm, specifically focusing on the outlook for the U.S. economy, inflation and monetary policy.

Uruçi's investment experience began in 2007. Before joining T. Rowe Price in 2022, Uruçi was a senior U.S. economist in the Washington, D.C., office of Barclays Capital. Previously, she was a European economist with Barclays' London office, where she was accountable for the U.K. market.

Uruçi earned a BSc with first-class honors in Economics and Politics from the University of Bath in Bath, England, and an MSc in Economics from the London School of Economics and Political Science.

Quinnipiac

School of Business



GOING BEYOND BUSINESS AS USUAL

The new School of Business at Quinnipiac University, launching in May 2025, is designed as an expression of our values and ambition. It fuses student-centric learning with cutting-edge technology and accelerate innovation in new areas of study while fostering interdisciplinary collaboration and inclusiveness.

LEARN MORE



qu.edu/sbbuilding

Participating Firms & Organizations

Aetna
Allspring Global Investments
AltTab Capital
Angelo Gordon
Barclays
BlackRock
Bloomberg
BMO Capital Markets
BofA Global Research
Bregal Investments
Business Insider
CAIA Association
Cambridge Associates
Center for Accelerating Financial Equity
CFA Institute
Charles Schwab
Coinbase
Connecticut Capital Management Group LLC
Corbin Advisors
Crawford Ventures Inc.
Credit Agricole CIB
Delphian Trading
Deutsche Bank
EDX Markets
FalconX
Fidelity Investments
Fiducient Advisors
Fiserv
FS Investments
GARP
Glenmede Investment Management
Goldman Sachs
Harbor Asset Private Wealth
Henkel
Insperity
J.P. Morgan Asset Management
Kyndryl
MA Pension

Members Exchange
Millennium
Mizuho Group
Morgan Stanley
Morning Consult
National Financial Network
NBA
NIRI, The Association of Investor Relations
Nuveen – TIAA
NYSE
Orion Innovation
PFC Social Impact Advisors
PGIM Fixed Income
Physis Investment
Piedmont Fund Services
Raymond James
RBC Wealth Management
Rockefeller Global Family Office
Russell Investments
Stackman, Casriel Group, UBS
Stone Capital Investors
Sumitomo Mitsui Banking Corporation
System Soft Technologies
T. Rowe Price
The Conference Board
The Depository Trust & Clearing Corporation
The Financial Times
The Information
The Wall Street Journal
TradeUpToWallStreet Inc.
Tradier Inc
UBS Global Wealth Management
Wilmington Trust – M&T Bank
Wooster Square Advisors



IS THE CHARTERED FINANCIAL ANALYST[®] (CFA) PROGRAM RIGHT FOR YOU?

The CFA Program provides the strongest foundation in advanced investment, analysis, and real-world portfolio management skills for a career advantage that you will use at all stages of your career. CFA Institute has recently changed eligibility for entering the CFA Program, giving you the chance to capitalize on your strengths and boost your education. With two years or fewer left in your undergraduate program, you are now eligible to apply.

If you're considering a career in finance and want to explore if it's the right path for you, simply scan the QR code below. You'll discover valuable insights into what a typical career in the investment management industry looks like. Additionally, you can explore all the latest exciting developments to the CFA Program by visiting the same page.



Access essential exam information, career guidance and **free** resources for students
cfainst.is/StudentResourcesGAME



Participating Schools

Abilene Christian University
Alfred University
American University of Beirut
Appalachian State University
Auburn University at Montgomery
Benedictine College
Bloomsburg University of Pennsylvania
Bryant University
California State University Chico
California State University Fresno
California State University Long Beach
California State University Sacramento
California State University San Marcos
Centenary College of Louisiana
Central Connecticut State University
Central Michigan University
Christopher Newport University
Coastal Carolina University
Columbia University
Columbus State University
Commonwealth University of Pennsylvania
Concordia University
CT State Manchester
Drew University
Duquesne University
Fairleigh Dickinson University
Florida International University
Francis Marion University
Iona University
Ithaca College
James Madison University
John Carroll University
Johnson & Wales University
Kennesaw State University
Kent State University
Kutztown University of Pennsylvania
Lake Superior State University
Lipscomb University
Longwood University
Marshall University

Meredith College
Merrimack College
Michigan Technological University
Milligan University
Mississippi College
Missouri State University
Montclair State University
Moravian University
Mount St. Mary's University
Naugatuck Valley Community College
New York University
Ouachita Baptist University
Pace University
Palm Beach Atlantic University
Penn State Behrend
Pepperdine University
Post University
Queens College
Radford University
Rochester Institute of Technology
Rowan University
St. Cloud State University
St. John's University
Saint Mary's University
Shippensburg University
Southeastern University
Stetson University
Temple University
Tennessee Wesleyan University
Texas State University
Towson University
Trinity University
Truman State University
University of Akron
University of Alabama at Birmingham
University of Alaska Anchorage
University of Alaska Fairbanks
University of Arkansas
University of Central Florida
University of Dayton
University of Houston Downtown

University of Lynchburg
University of Maine
University of Mary
University of Miami
University of Minnesota Duluth
University of Mount Union
University of Nebraska at Kearney
University of Nebraska Lincoln
University of Nebraska at Omaha
University of New Hampshire
University of North Dakota
University of Oklahoma
University of Rhode Island
University of Saskatchewan
University of South Dakota
University of South Florida
University of Tennessee at Chattanooga
University of Tennessee at Martin
University of Texas at Arlington
University of Texas at San Antonio
University of the Pacific
University of the South
University of Washington Bothell
University of West Florida
Valdosta State University
Washington College
Washington State University
Washington State University Vancouver
Weber State University
Western Connecticut State University
Western Kentucky University
Whitworth University
Willamette University
Yale School of Management
Youngstown State University

List subject to change based on registration date.

Sponsors

GOLD



SILVER



Own your tomorrow.



BRONZE



EXHIBITORS



Oversight Chair Letter

It's an honor and a privilege to welcome you to GAME Forum XIII. I've spent much of the past year leading a team of 48 student volunteers whose collective purpose is to make GAME the premier destination for future leaders of the financial services industry. I truly believe we've provided the best conference yet.

Hamden, Connecticut, has always been my home, and I realized early on in my college search that I didn't need to go far for a first-class education that would put me on the fast track to a high-impact career in finance. No other university could offer such a one-of-a-kind learning opportunity as Quinnipiac's GAME Forum. That was evident from my first college tour at Quinnipiac.

New York is home, too, and we are thrilled to be back in the city after last year's successful return to an in-person format. I learned so much as student co-chair in 2023 that I've applied to planning this year's event. Along with my predecessor, Dylan Jones '22, MBA '23, we developed and executed a vision for taking GAME to new heights. I have the utmost confidence in my successor, Quinn Guth '24, MBA '25, to keep that momentum rolling. I would also like to take this opportunity to thank Graduate Assistant Ayomide Onakade for her continued support throughout the planning process.

My parting advice to you, as you get set to embark on this incredible two-day experience, is to open yourself up to the possibility of creating lasting relationships that will shape your career. Your future mentor or supervisor could be speaking in one of these highly curated panels. A lifelong colleague could be sitting next to you. Savor the present. Our future begins now.

Sincerely,



Aidan Greene '23, MBA '24
Oversight Chair

CHAIRS

Aidan Greene, *Oversight Chair*
Quinn Guth, *Oversight Co-Chair*
Grace Port Vliet, *PR Chair*
Morgan Murray, *PR Co-Chair*
Alyese Ferreira, *Registration Chair*
Joe Bucello, *Registration Co-Chair*
Dominick Passanante, *Outreach Chair*
Ross Kulaga, *Outreach Co-Chair*
Jacob Nuñez, *Competiton Chair*
Charlie Lehourites, *Competiton Co-Chair*
Robert Margiotta, *Competiton Co-Chair*
Max Quinn, *VIP Chair*
Paul Heilbronn, *VIP Co-Chair*
Rebecca Seganti, *Logistics Chair*
Nick Monfredo, *Logistics Co-Chair*
Robert Nicolich, *Breakout Chair*
Liam O'Dwyer, *Breakout Co-Chair*

GRADUATE ASSISTANT

Ayomide Onakade

VOLUNTEERS

BREAKOUT

Matthew Hines
Tyler Kobus
Ross Kulaga
Abigail Leitao

COMPETITION

Michael Caggiano
Saliba Kaoud

PUBLIC RELATIONS

Evan Croteau
Steven Keane
Samuel Kornfeld

LOGISTICS

Suzeline Cadestin
Tyler DelGrande
Sarah Dusse
Giancarlo Ferrara
Daniel O'Sullivan
Patrik Veletzki

OUTREACH

Peter Buck
Anish Datye
Dante Duteau
Gabriella Leite

REGISTRATION

Grace Corfield
Jillian Kenny
Payton Orosco
Christopher Paul
Zachary Rotkowitz
Michael Schaefer

VIP

Jake Braglia
Claudio Cabrera
Kevin Keane
Ryan Keaveney
Apoorva Kuppa
Craig Mollica
David Vergules

You could climb the corporate ladder. But why not take the elevator?

If you want to accelerate your career, look into our Management Development Program.

This program gives you the chance to expand your experience with leaders in the U.S. financial services industry – M&T Bank and Wilmington Trust.

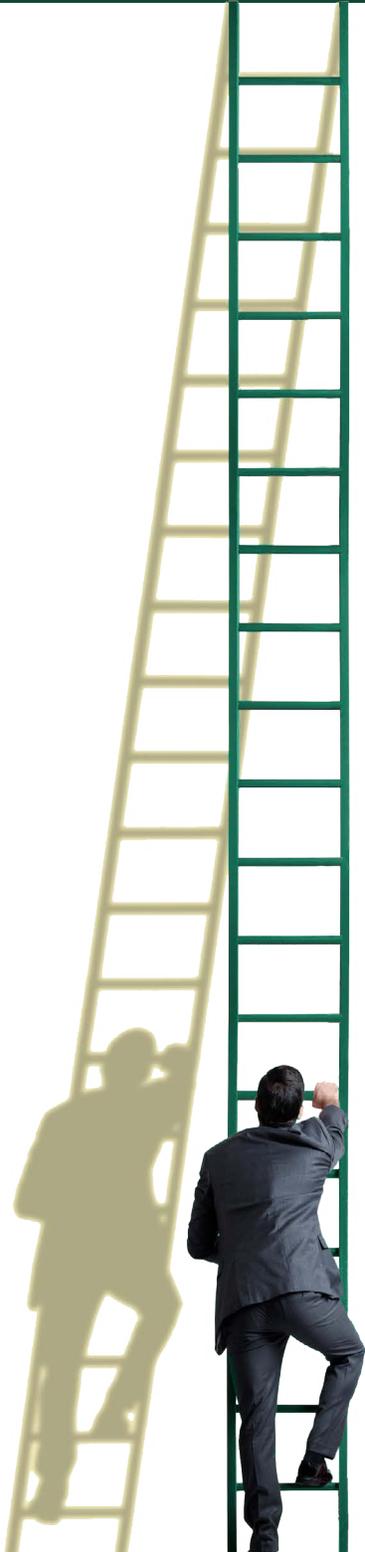
When you participate in our program, you'll work with teams from different business lines, and professionals across all levels of our company. You'll also have a voice in helping us improve the lives of our customers and the communities we live in.

Work with people who can help you grow.

Scan the QR code to learn more about our internships and employment opportunities.



M&T Bank
Official Banking Partner, Quinnipiac University



PLEASE JOIN US NEXT YEAR

in New York for the 2025 GAME Forum
and Portfolio Competition.

FIND MORE AT



game.qu.edu



April 3-4, 2025 // New York Marriott Marquis // New York, NY

Quinnipiac
School of Business

game.qu.edu | qgame@qu.edu | 203-582-3888